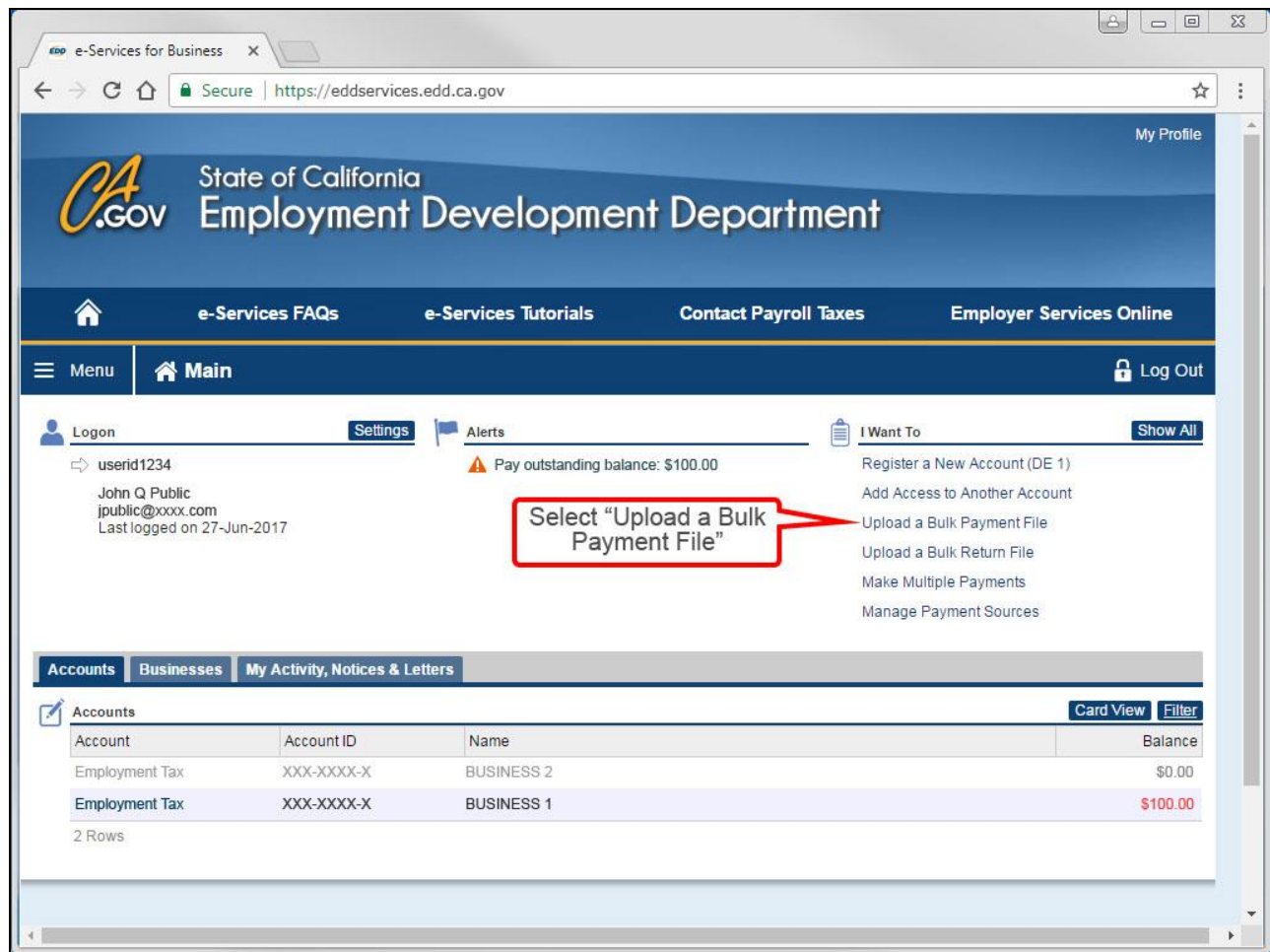

I Want to Upload a Bulk Payment File, Bulk Return File, or Submit a Bulk Rate Inquiry

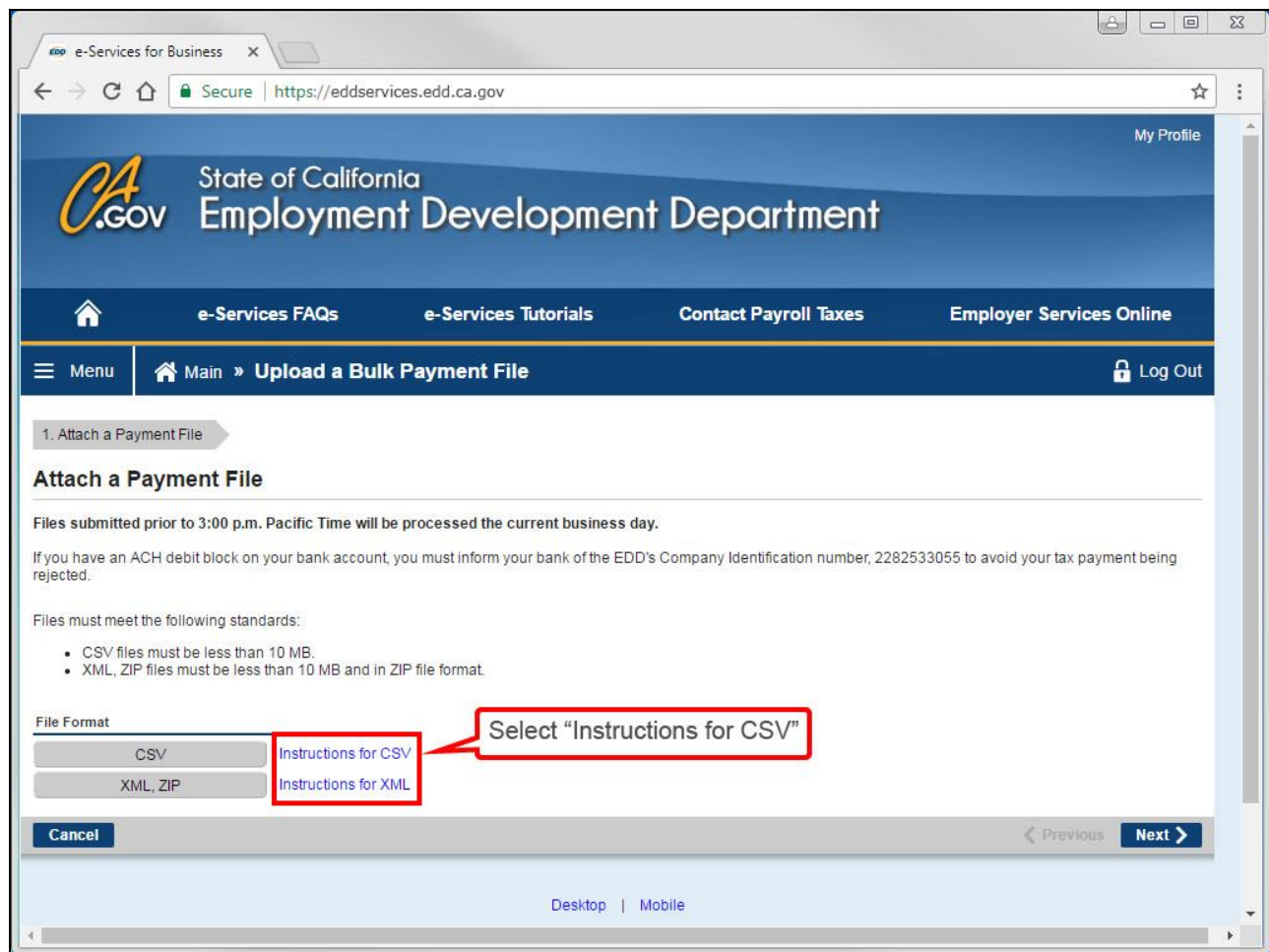
Slide notes

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business. This tutorial is for an employer representative/payroll agent who wants to make a bulk payment for many different accounts, file bulk returns, or submit bulk Unemployment Insurance (UI) rate requests.



Slide notes

We will begin at the e-Services for Business home page. Select "Upload a Bulk Payment File" from the "I Want To" menu.



Slide notes

If needed, select the "Instructions for CSV" or "Instructions for XML" link for assistance. For this example, we select "Instructions for CSV."

e-Services for Business x

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Log Out

CSV Instructions

CSV File Format
Open a Microsoft Excel, Microsoft Word, or Microsoft Notepad document and enter the data according to the field position layout in the table below:

Field Name	Length	Format	Position (Column)
Employer Account Number	8	Numeric	1
Pay Date (Payroll Date)	8	MMDDYYYY	2
Bank Debit Date	8	MMDDYYYY	3
Deposit Schedule: M: Monthly N: Next Business Day Q: Quarterly S: Semiweekly	1	Alpha – Must be one of (M, N, Q, S)	4
Bank Routing Number	9	Numeric	5
Bank Account Number	n/a	Numeric	6
Bank Account Type C: Checking S: Savings	1	C or S	7
UI Amount	n/a	Dollar Amounts = 52.00 (Example) Zero Dollar Amounts = 0.00 or 0	8
ETT Amount	n/a	Dollar Amounts = 52.00 Zero Dollar Amounts = 0.00 or 0	9
SDI Amount	n/a	Dollar Amounts = 52.00 Zero Dollar Amounts = 0.00 or 0	10
PIT Amount	n/a	Dollar Amounts = 52.00 Zero Dollar Amounts = 0.00 or 0	11
Penalty Amount	n/a	Dollar Amounts = 52.00 Zero Dollar Amounts = 0.00 or 0	12
Interest Amount	n/a	Dollar Amounts = 52.00 Zero Dollar Amounts = 0.00 or 0	13

Important
All the tax payment fields and columns must be filled. Dollar amounts (except for zero dollar amounts) must include a decimal point. For example:

- Dollar amounts must be formatted as: 52.00.

Select "OK"

OK Cancel

Slide notes

Here are the CSV file format instructions. When you are finished viewing the instructions, select "OK" to continue.

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Menu Main » **Upload a Bulk Payment File** Log Out

1. Attach a Payment File

Attach a Payment File

Files submitted prior to 3:00 p.m. Pacific Time will be processed the current business day.

If you have an ACH debit block on your bank account, you must inform your bank of the EDD's Company Identification number, 2282533055 to avoid your tax payment being rejected.

Files must meet the following standards:

- CSV files must be less than 10 MB.
- XML, ZIP files must be less than 10 MB and in ZIP file format.

File Format

CSV [Instructions for CSV](#)

XML, ZIP [Instructions for XML](#)

Add Attachment

Cancel Previous Next

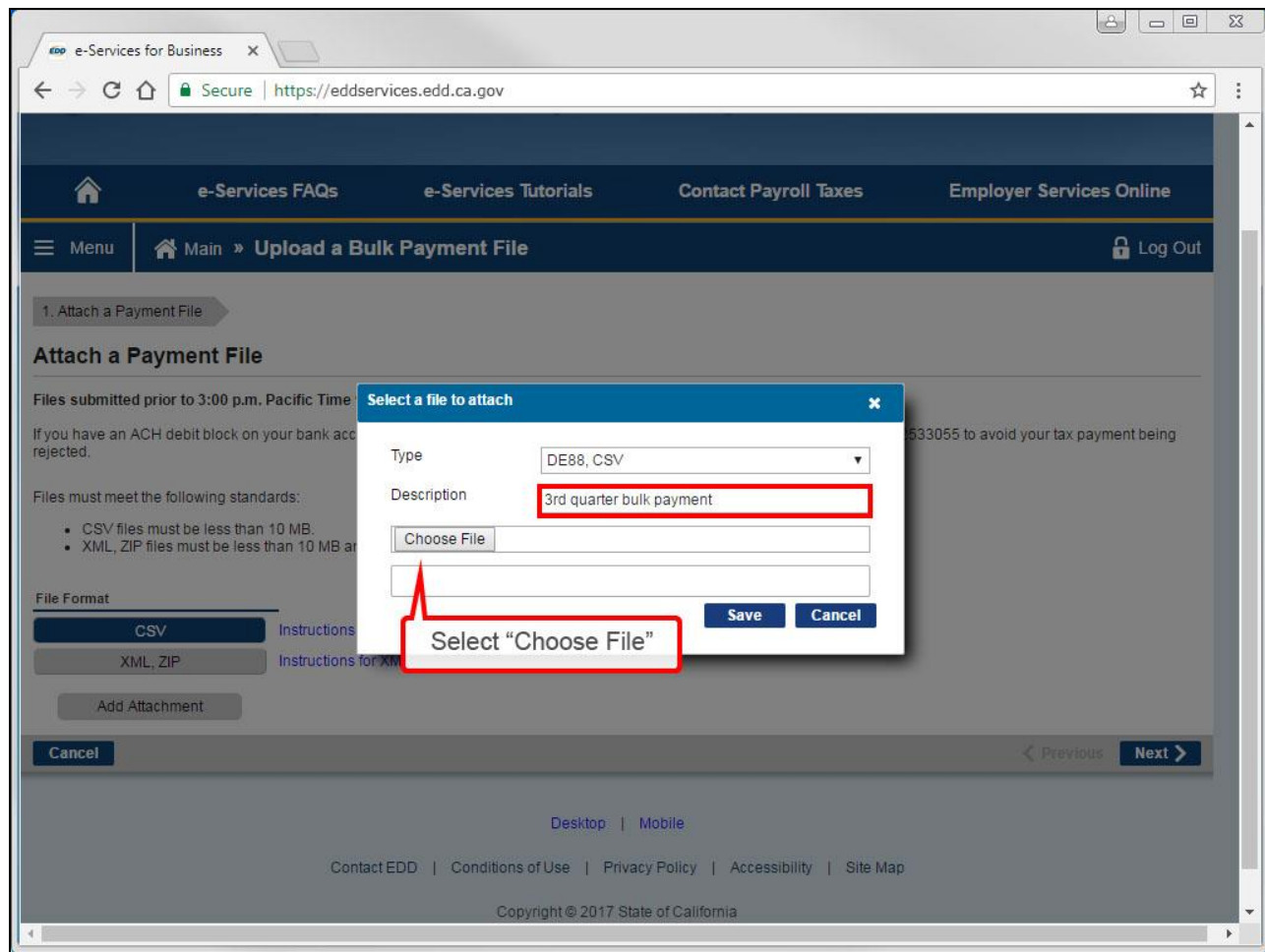
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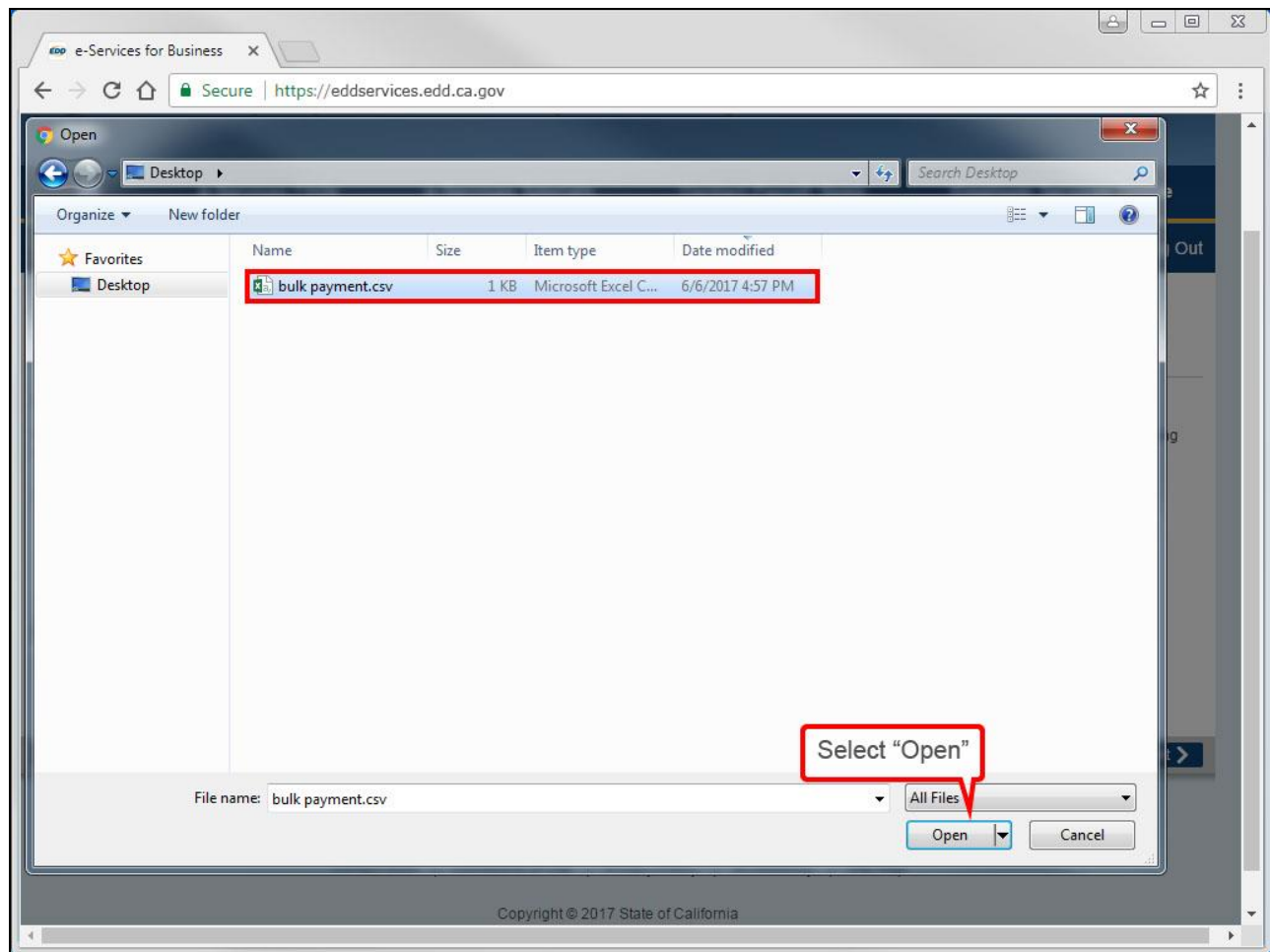
Slide notes

Select the File Format. For this example, we select CSV. Select "Add Attachment" to continue.



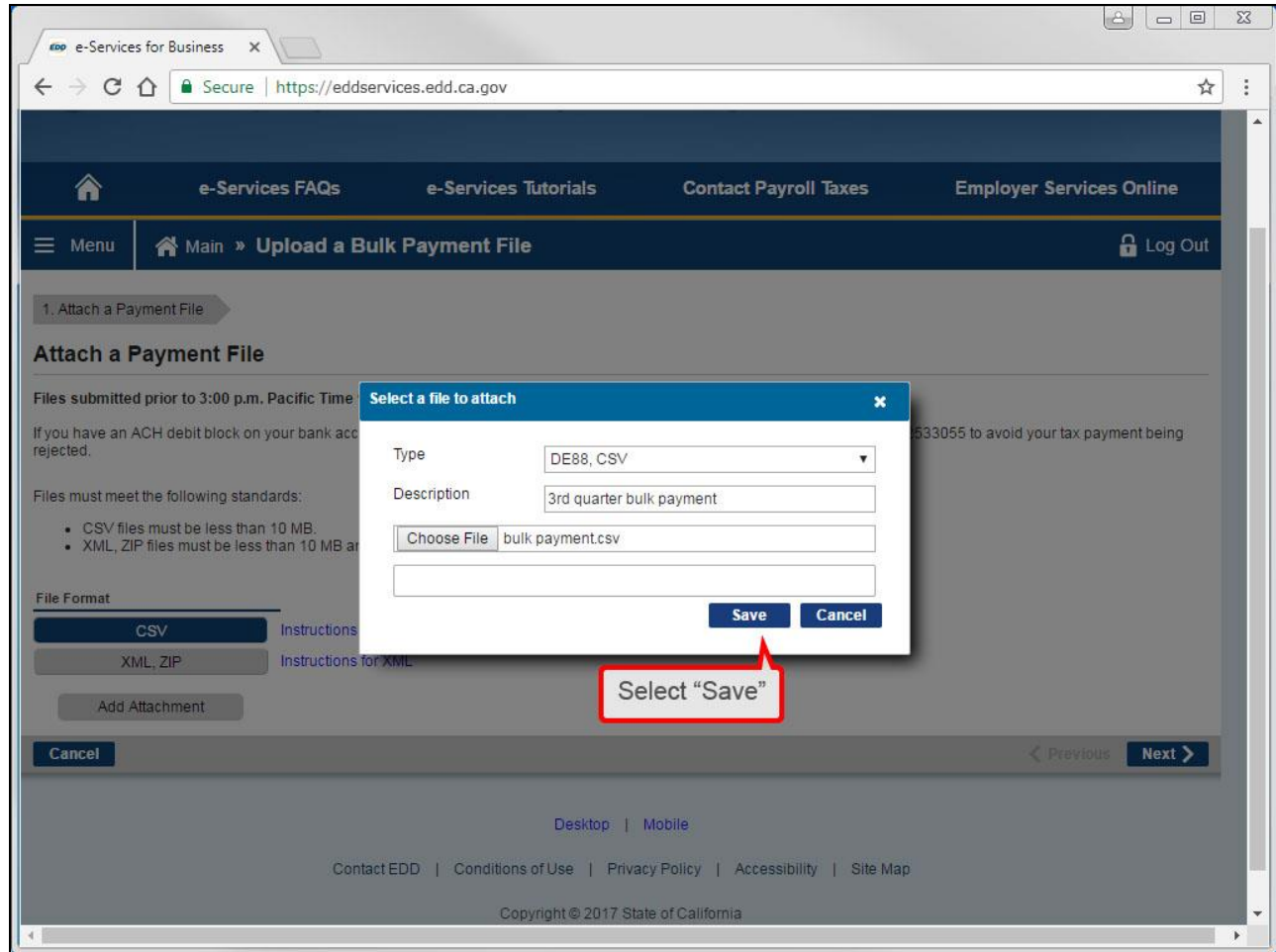
Slide notes

Fill in the "Description" field with a name that you will recognize and then select "Choose File" to find the file you want to import.



Slide notes

Choose the correct file to import, and then select “Open” to import the attachment.



Slide notes

Now the attachment has been imported. Select "Save."

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Menu Main » **Upload a Bulk Payment File** Log Out

1. Attach a Payment File

Attach a Payment File

Files submitted prior to 3:00 p.m. Pacific Time will be processed the current business day.

If you have an ACH debit block on your bank account, you must inform your bank of the EDD's Company Identification number, 2282533055 to avoid your tax payment being rejected.

Files must meet the following standards:


- CSV files must be less than 10 MB.
- XML, ZIP files must be less than 10 MB and in ZIP file format.

File Format

CSV [Instructions for CSV](#)

XML, ZIP [Instructions for XML](#)

Add Attachment

 Attachments

Type	Name	Description	Size	
DE88, CSV	bulk payment.csv	3rd quarter bulk payment	0	Remove

Cancel [Previous](#) **Next**

Desktop | Mobile

Select "Next"

Slide notes

Now you can see the attachment that has been imported. Select "Next" to continue.

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page header includes the "U.S. Gov" logo and the text "Employment Development Department". The navigation bar contains links for "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". The main content area is titled "Upload a Bulk Payment File" and includes a "Log Out" link. Below the title, there are two tabs: "1. Attach a Payment File" and "2. Contact Information". The "Contact Information" tab is active, and the form is titled "Contact Information". The form instructions state: "Employer/Agent/Employer Representative: Enter your business information.. An internal representative (i.e. employee) should enter their employer's information." The form fields are: First Name (John), Last Name (Public), Phone Number (916-512-1212), Extension (empty), and Email (jpublic@xxx.com). A red box highlights the form fields. A red callout box with the text "Select 'Next'" points to the "Next" button. The "Next" button is located at the bottom right of the form, next to a "Previous" button. The footer contains links for "Desktop" and "Mobile", and a copyright notice for 2017 State of California.

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U.S. Gov Employment Development Department

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Menu Main » Upload a Bulk Payment File Log Out

1. Attach a Payment File 2. Contact Information

Contact Information

Employer/Agent/Employer Representative: Enter your business information..

An internal representative (i.e. employee) should enter their employer's information.

First Name John

Last Name Public

Phone Number 916-512-1212

Extension

Email jpublic@xxx.com

Cancel Previous Next

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Slide notes

Complete the "Contact" information for the person completing this request and select "Next" to continue.

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Menu Main » Upload a Bulk Payment File Log Out

1. Attach a Payment File 2. Contact Information 3. Contact Address Information

Contact Address Information

Employer/Agent/Employer Representative: Enter your business information..

An internal representative (i.e. employee) should enter their employer's information.

Address 456 Any St
City Sacramento
State CALIFORNIA
ZIP Code 95814

Select "Submit"

Cancel Previous Submit

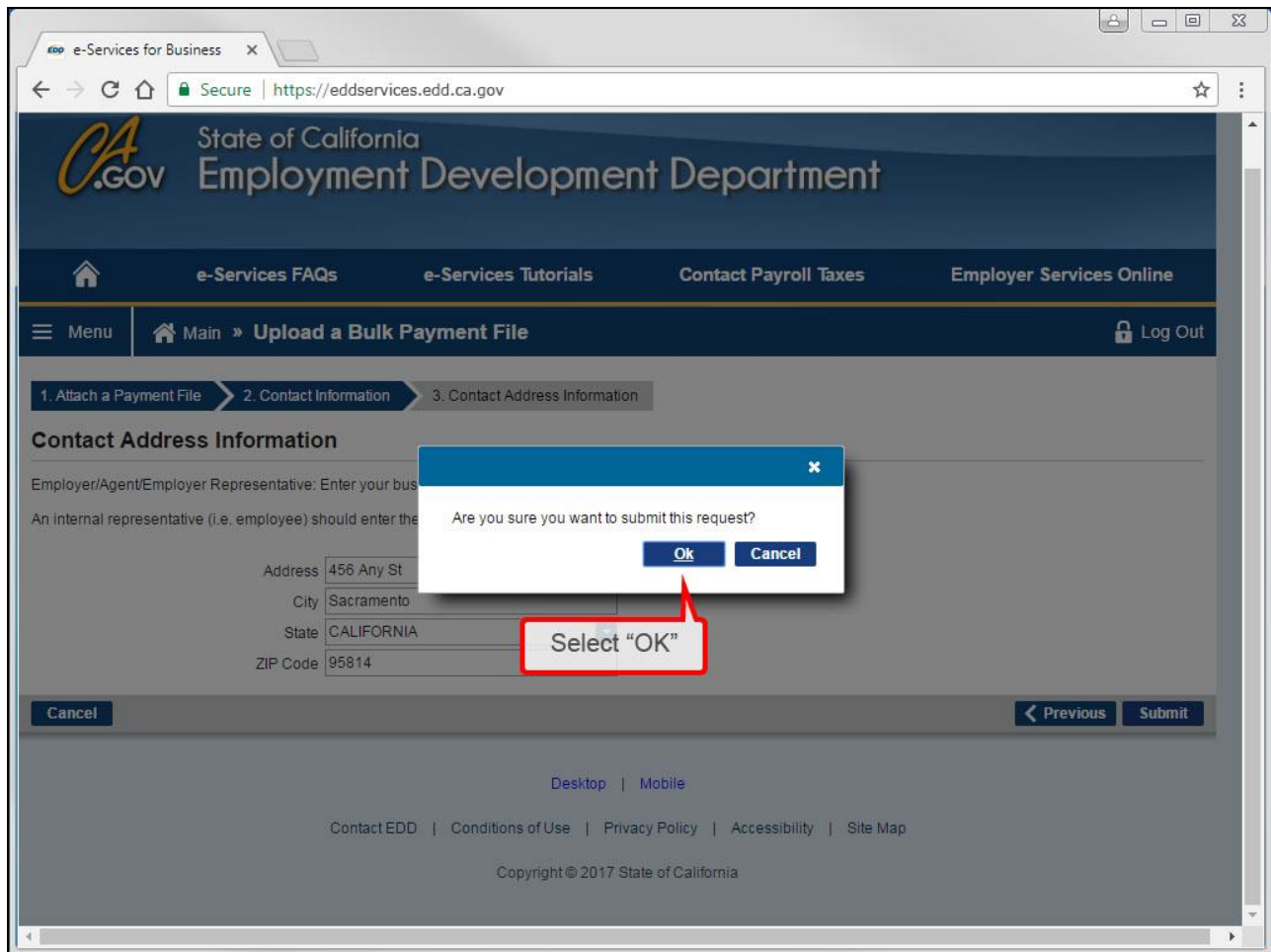
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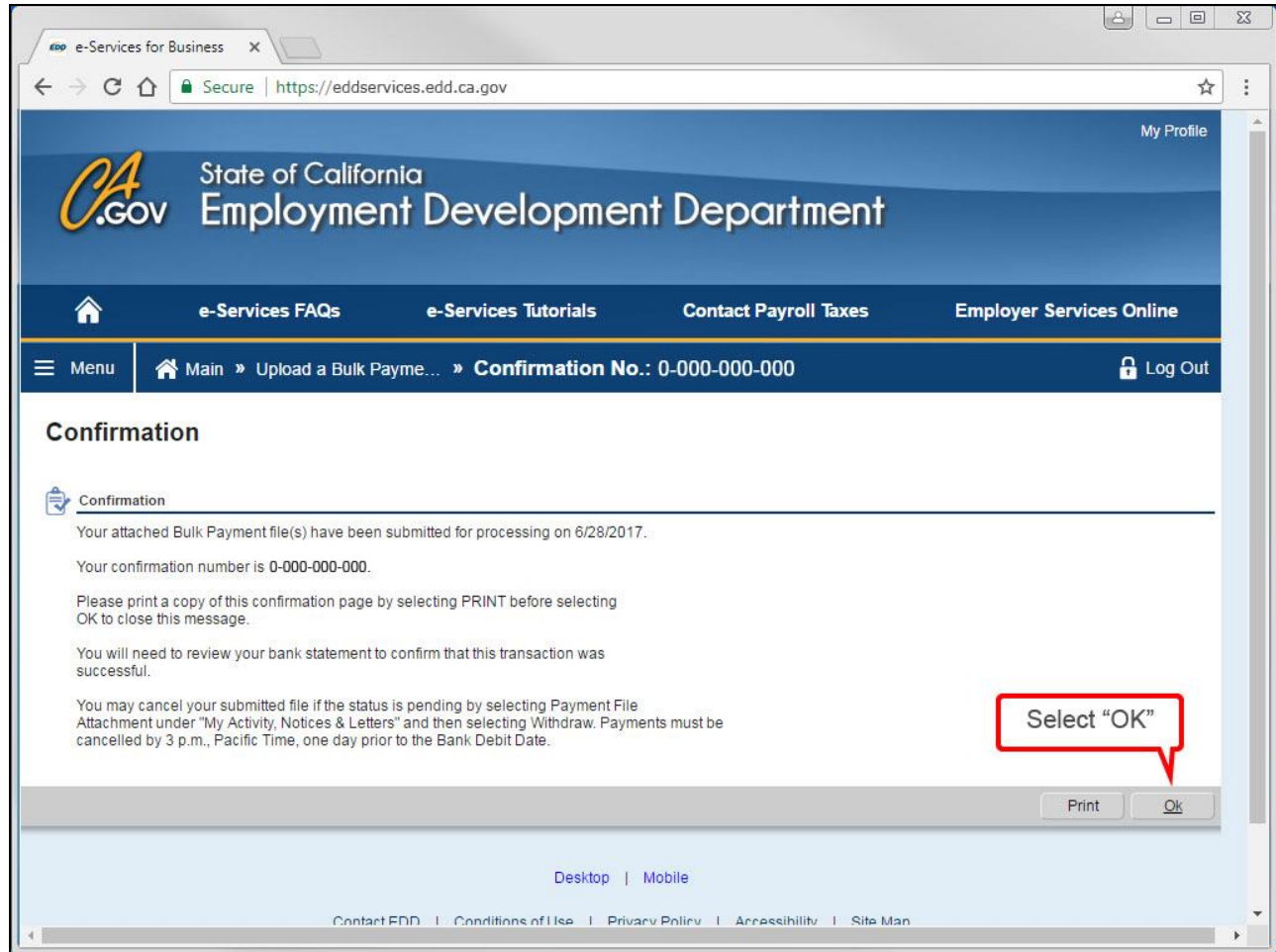
Slide notes

Complete the "Contact Address" information for the person completing this request and select "Submit" to continue.



Slide notes

Are you sure you want to submit this request? Select "OK."



Slide notes

Here is the confirmation page, including your confirmation number. Select "OK" to complete this process and navigate back to the e-Services for Business home page.

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Menu Main Log Out

Logon Settings Alerts I Want To Show All

userid1234
John Q Public
jpublic@xxxx.com
Last logged on 27-Jun-2017

Pay outstanding balance: \$100.00

Select "Upload a Bulk Return File"

Register a New Account (DE 1)
Add Access to Another Account
Upload a Bulk Payment File
Upload a Bulk Return File
Make Multiple Payments
Manage Payment Sources

Accounts Businesses My Activity, Notices & Letters

Accounts Card View Filter

Account	Account ID	Name	Balance
Employment Tax	XXX-XXXX-X	BUSINESS 2	\$0.00
Employment Tax	XXX-XXXX-X	BUSINESS 1	\$100.00

2 Rows

Slide notes

Now, let's attach a bulk return file. Select "Upload a Bulk Return File" from the "I Want To" menu.

EDD e-Services for Business

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Menu Main » Upload a Return File Log Out

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type

Attachment Type

Important:

- NER and ICR files must be less than 5 MB and in ZIP file format.
- It may take up to 2 weeks to process your file.

Please select an attachment type

Tax Return

Wage Report

NER

ICR

Cancel Previous **Next**

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Slide notes

Select an attachment type. For this example, we select "Wage Report." Select "Next" to continue.

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Menu Main » Upload a Return File Log Out

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type 2. Form Type

Form Type

Only one file type (i.e. ICESA) and return type (i.e. DE 9C) is accepted per attachment.

Please select a form type

DE6
DE9C

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Slide notes

Select a form type. For this example, we select "DE9C." Select "Next" to continue.

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Menu Main » Upload a Return File Log Out

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type 2. Form Type 3. File Format

File Format

XML files must be less than 10 MB and in ZIP file format.
Files submitted prior to 6:30 p.m., Pacific Time, will be processed the current business day.

MMREF and ICESA files must be less than 10 MB and in ZIP file format.
It may take up to 6 weeks to process your file.

Please select a file format type

ICESA

MMREF

XML

Add Attachment

XML files must be less than 10 MB and in ZIP file format. Files submitted prior to 6:30 p.m., Pacific Time, will be processed the current business day.

Cancel Previous Next

Slide notes

Select a file format type. For this example, we select "XML" and then select "Add Attachment."

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Menu Main » Upload a Return File Log Out

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type 2. Form Type 3. File Format

File Format

XML files must be less than 10 MB and in ZIP file format.
Files submitted prior to 6:30 p.m., Pacific Time will be processed the next business day.

MMREF and ICESA files must be less than 10 MB.
It may take up to 6 weeks to process your file.

Please select a file format type

ICESA
MMREF
XML
Add Attachment

Select a file to attach

Type DE9C, XML, ZIP

Description 2nd quarter de9c

Choose File No file chosen

Select "Choose File"

Save Cancel

Cancel Previous Next

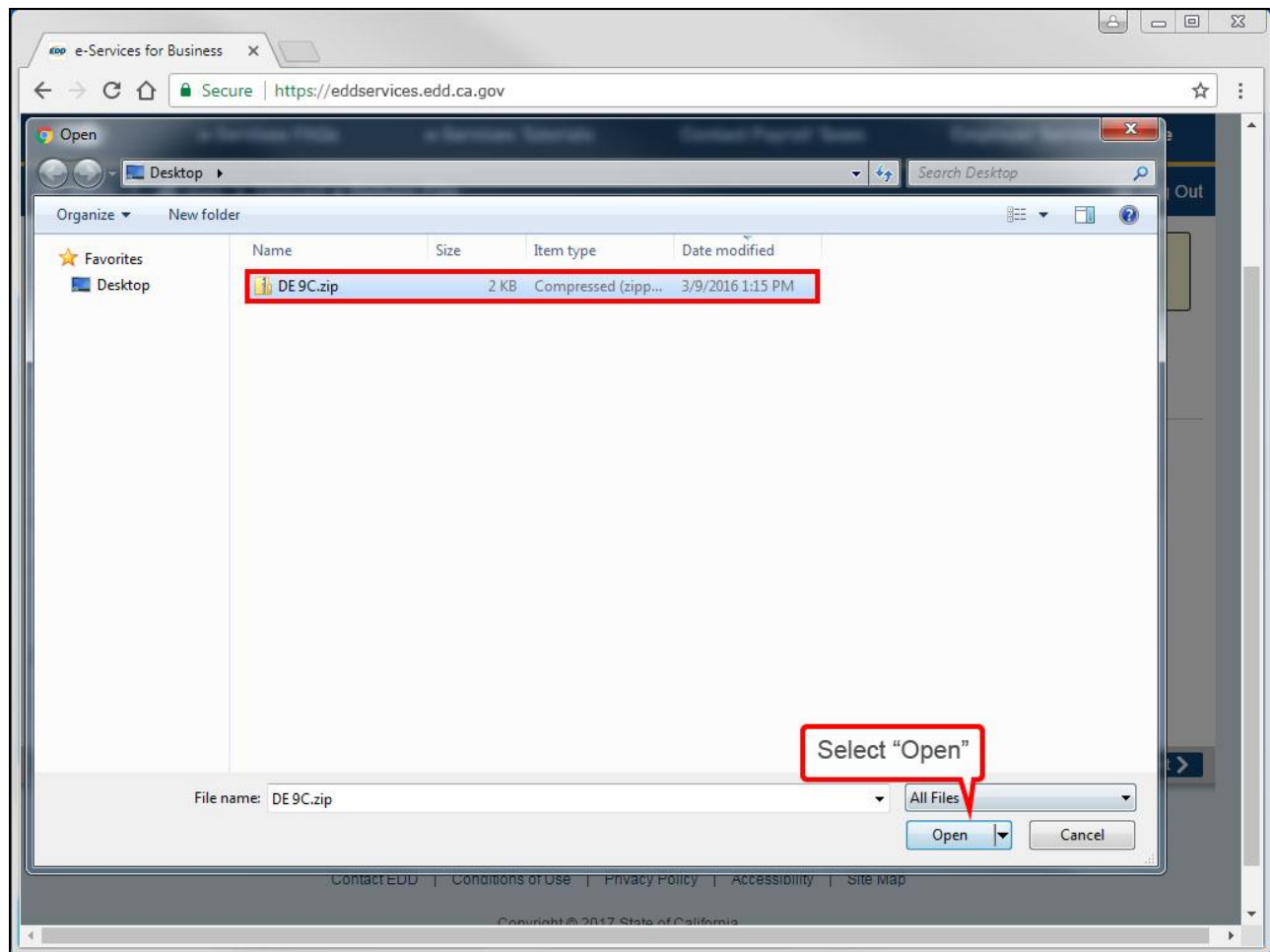
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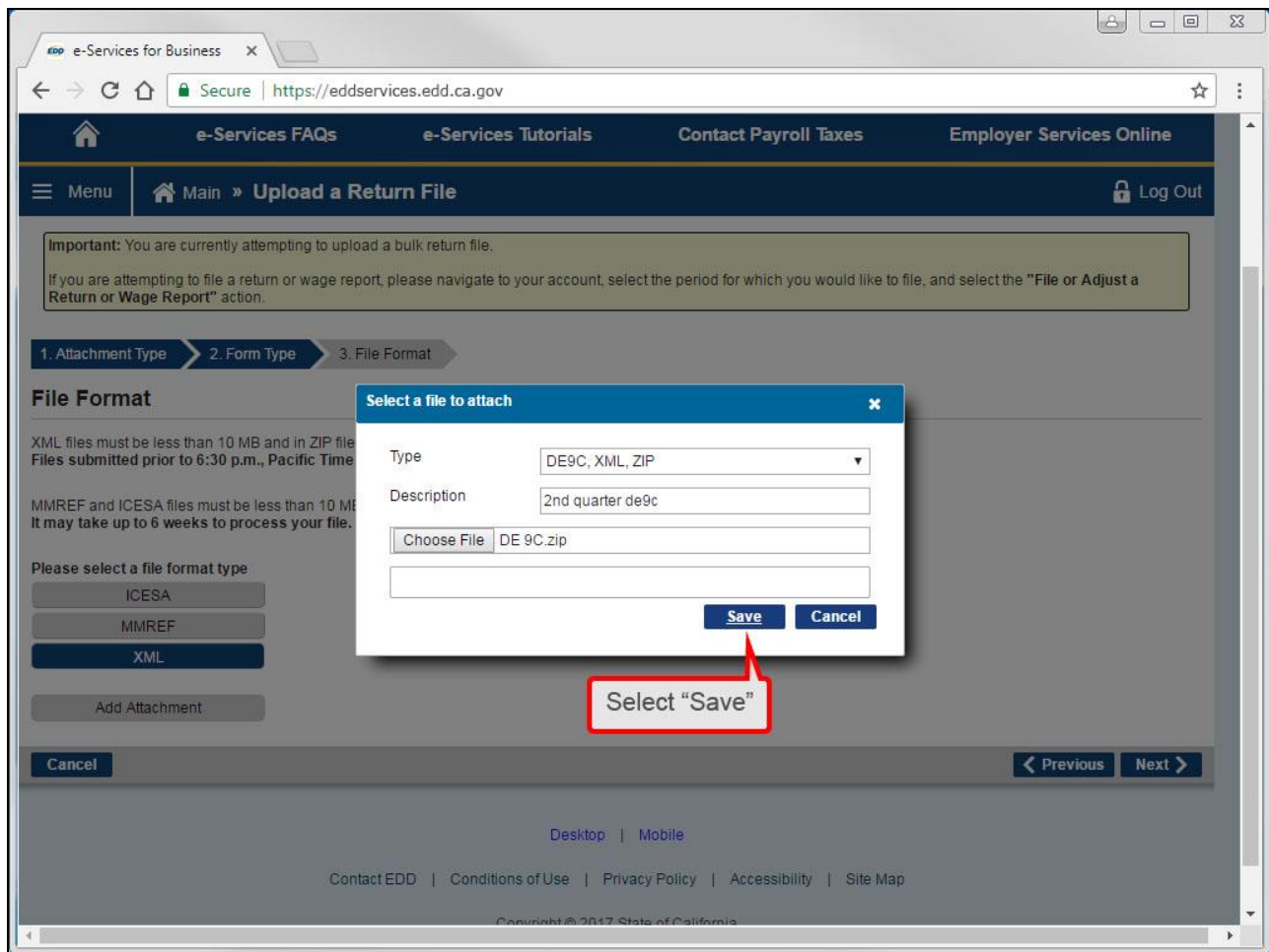
Slide notes

Enter a description of the file and then select "Choose File" to find the file you want to import.



Slide notes

Select the correct file and then select “Open” to import the attachment.



Slide notes

Select "Save" to continue.

e-Services for Business x

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[e-Services Tutorials](#)
[Contact Payroll Taxes](#)
[Employer Services Online](#)

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[Main » Upload a Return File](#)
[Log Out](#)

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type > 2. Form Type > 3. File Format

File Format

XML files must be less than 10 MB and in ZIP file format.
Files submitted prior to 6:30 p.m., Pacific Time, will be processed the current business day.

MMREF and ICESA files must be less than 10 MB and in ZIP file format.
It may take up to 6 weeks to process your file.

Please select a file format type

Attachments

Type	Name	Description	Size	
DE9C, XML, ZIP	DE 9C.zip	2nd quarter de9c	1	Remove

Select "Next"

Slide notes

Now you can see the attachment that has been imported. Select "Next" to continue.

EDD e-Services for Business x

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Menu Main » **Upload a Return File** Log Out

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type > 2. Form Type > 3. File Format > 4. Submitter Information

Submitter Information

Business Name	Business 1
Street	456 Any St
City	Sacramento
State	CALIFORNIA
Zip Code	95814

Cancel Previous Next

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Slide notes

Complete the "Submitter" information and when complete, select "Next" to continue.

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Menu Main » Upload a Return File Log Out

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type > 2. Form Type > 3. File Format > 4. Submitter Information > 5. File Information

File Information

Reporting Period	30-Jun-2017	
Number of Accounts in File		1
Number of Employees in File		6

Cancel < Previous **Next** >

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Slide notes

Complete the "File" information and when complete, select "Next" to continue.

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Menu Main » Upload a Return File Log Out

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type > 2. Form Type > 3. File Format > 4. Submitter Information > 5. File Information > 6. Declaration

Declaration

I declare that the information herein is true and correct to the best of my knowledge.

First Name	Required	Required
Last Name	Required	Required
Title	Required	Required
Phone Number	Required	Required
Email	Required	Required

Select "Submit"

Cancel Previous Submit

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Slide notes

The declaration page is very important. This is where you declare that the information herein is true and correct to the best of your knowledge. When the information is complete, select "Submit."

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Home Main » Upload a Return File

Log Out

Important: You are currently attempting to upload a bulk return file.
If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the "File or Adjust a Return or Wage Report" action.

1. Attachment Type

2. Form Type

3. File Format

4. Submitter Information

5. File Information

6. Declaration

Declaration

I declare that the information herein is true and correct to the best of my knowledge.

First NameJohn

Last NamePublic

TitlePresident

Phone Number1-916-512-1212

Emailjpublic@xxx.com

Select "Submit"

Cancel

Previous

Submit

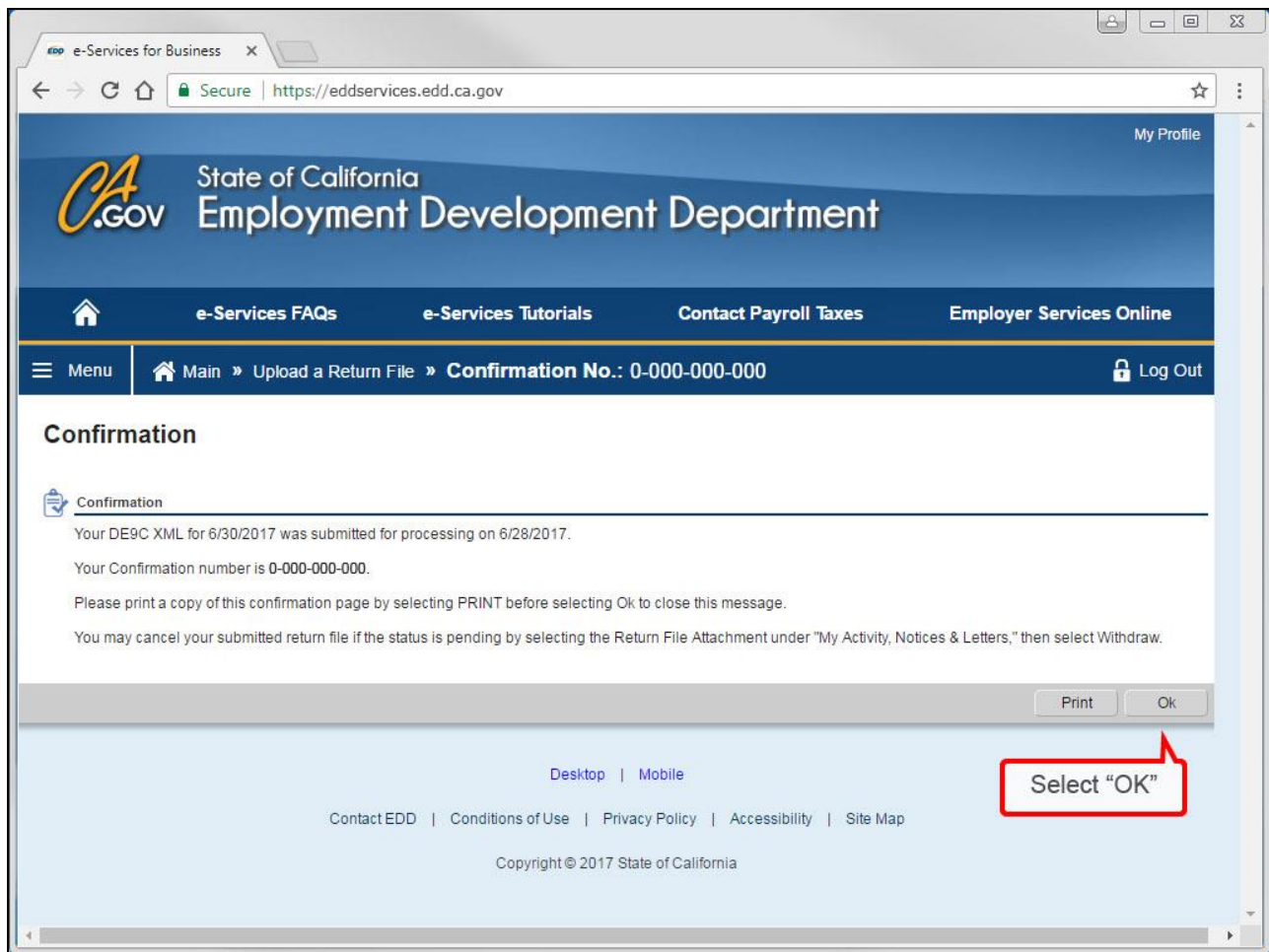
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The screenshot shows the EDD e-Services for Business portal. The browser address bar displays <https://eddservices.edd.ca.gov>. The page header includes the CA.gov logo and the text "State of California Employment Development Department". The navigation bar contains links for "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". The main content area is titled "Upload a Return File" and includes a "Log Out" link. A warning message states: "Important: You are currently attempting to upload a bulk return file. If you are attempting to file a return or wage report, please navigate to your account, select the period for which you would like to file, and select the 'File or Adjust a Return or Wage Report' action." Below this, a progress bar shows steps 1 through 6, with step 5, "File Information", currently selected. The "Declaration" section contains a statement: "I declare that the information herein is true and correct to the best of my knowledge." and a form with the following fields: First Name (John), Last Name (Public), Title (President), Phone Number (1-916-512-1212), and Email (jpublic@xxx.com). A modal dialog box is open, asking "Are you sure you want to submit this request?" with "Ok" and "Cancel" buttons. A red box highlights the "Ok" button with the text "Select 'OK'".

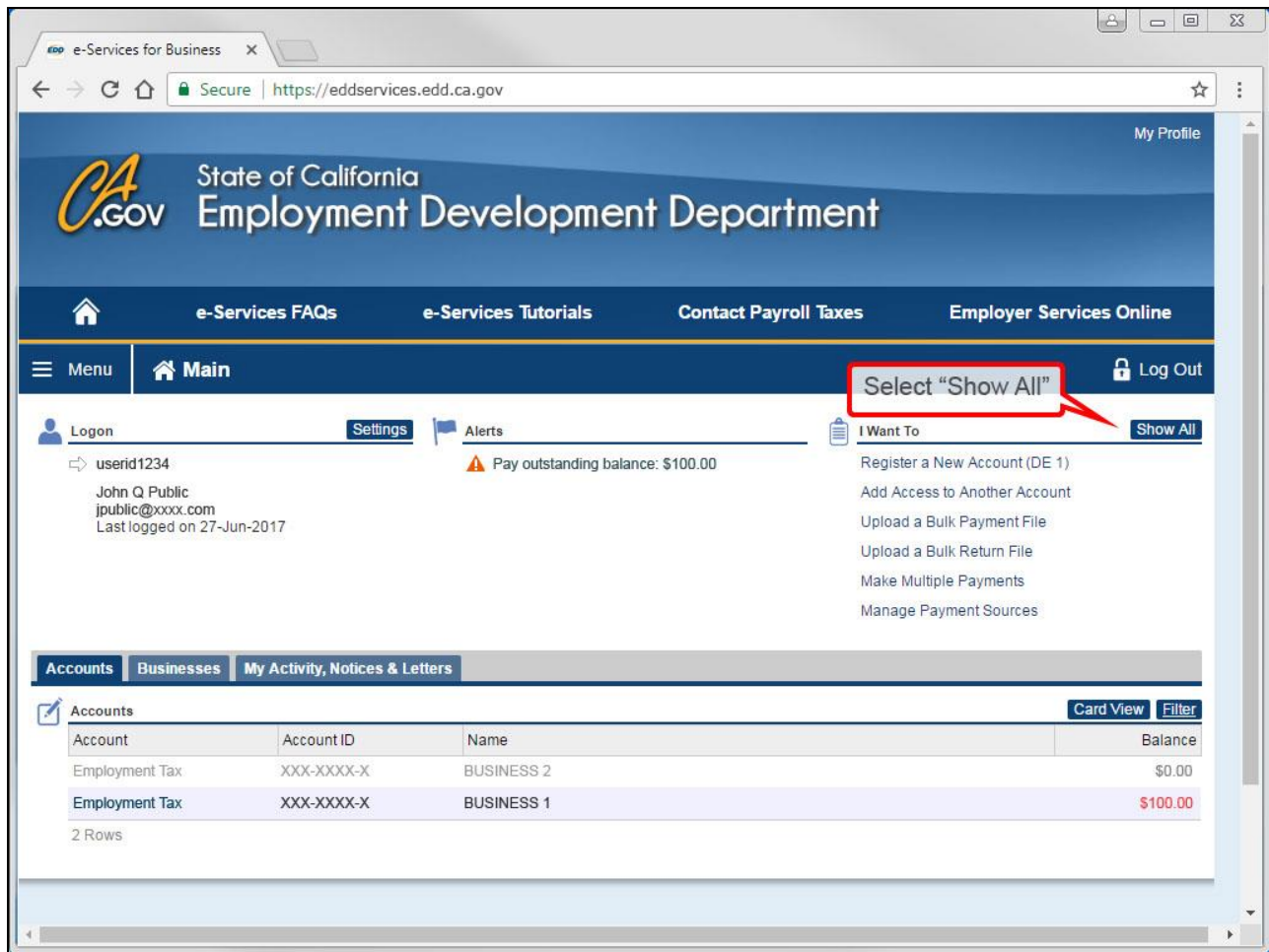
Slide notes

Are you sure you want to submit this request? Select "OK."



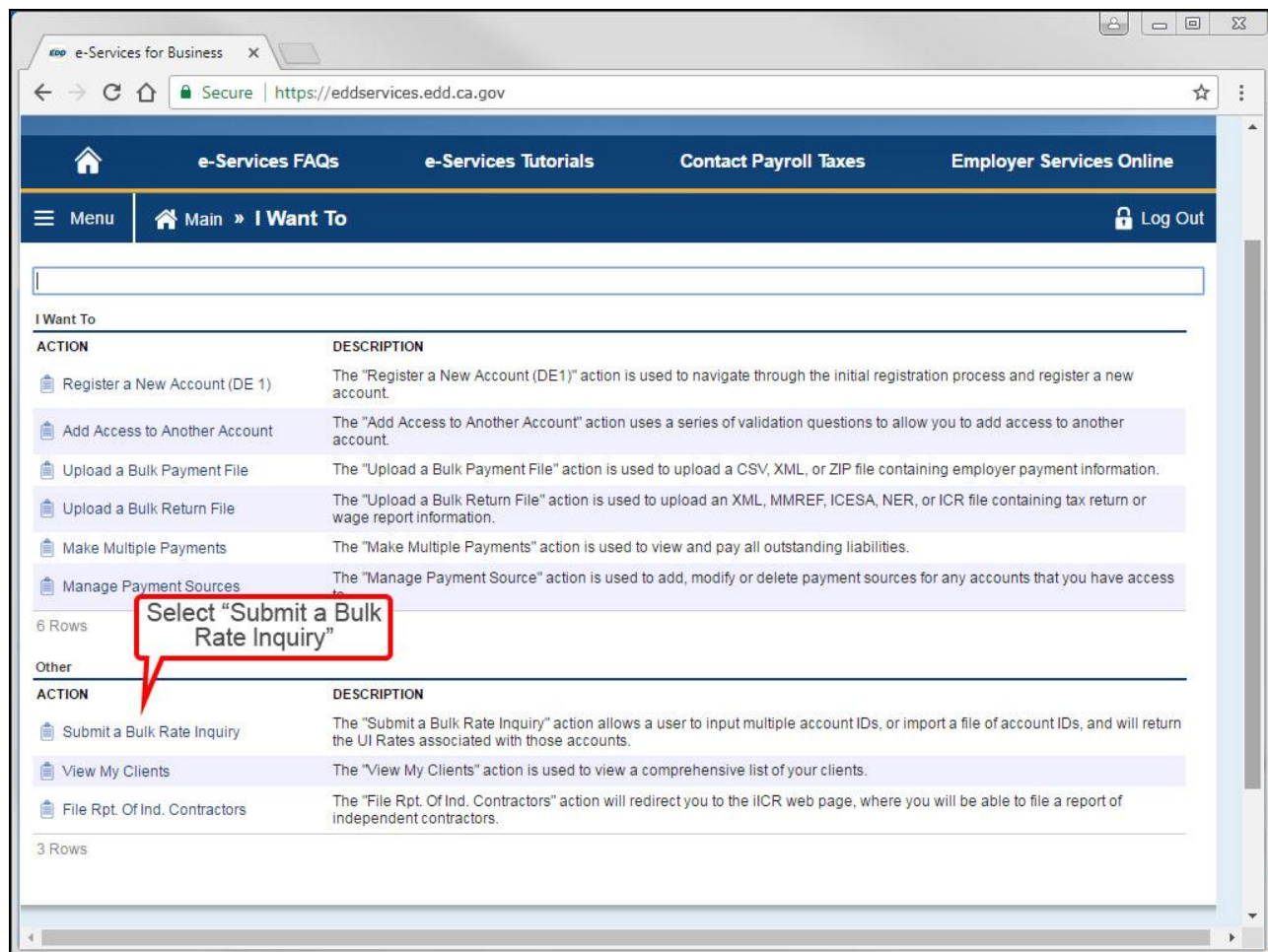
Slide notes

Here is the confirmation page. Your DE9C XML was submitted for processing. Select "OK" to complete this process and to navigate back to the e-Services for Business home page.



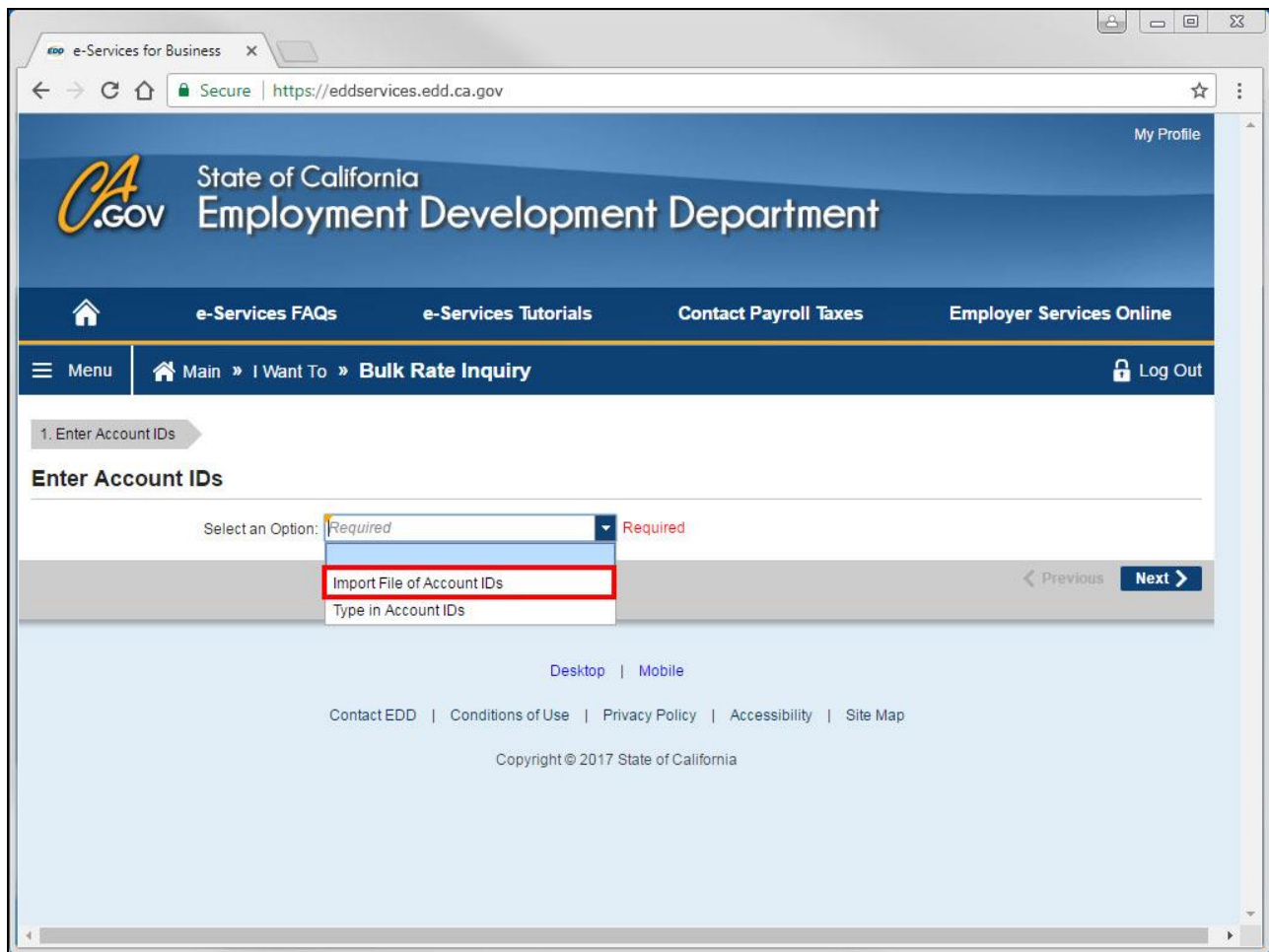
Slide notes

Now let's submit a bulk rate inquiry. To begin, select the "Show All" link next to the "I Want To" menu.



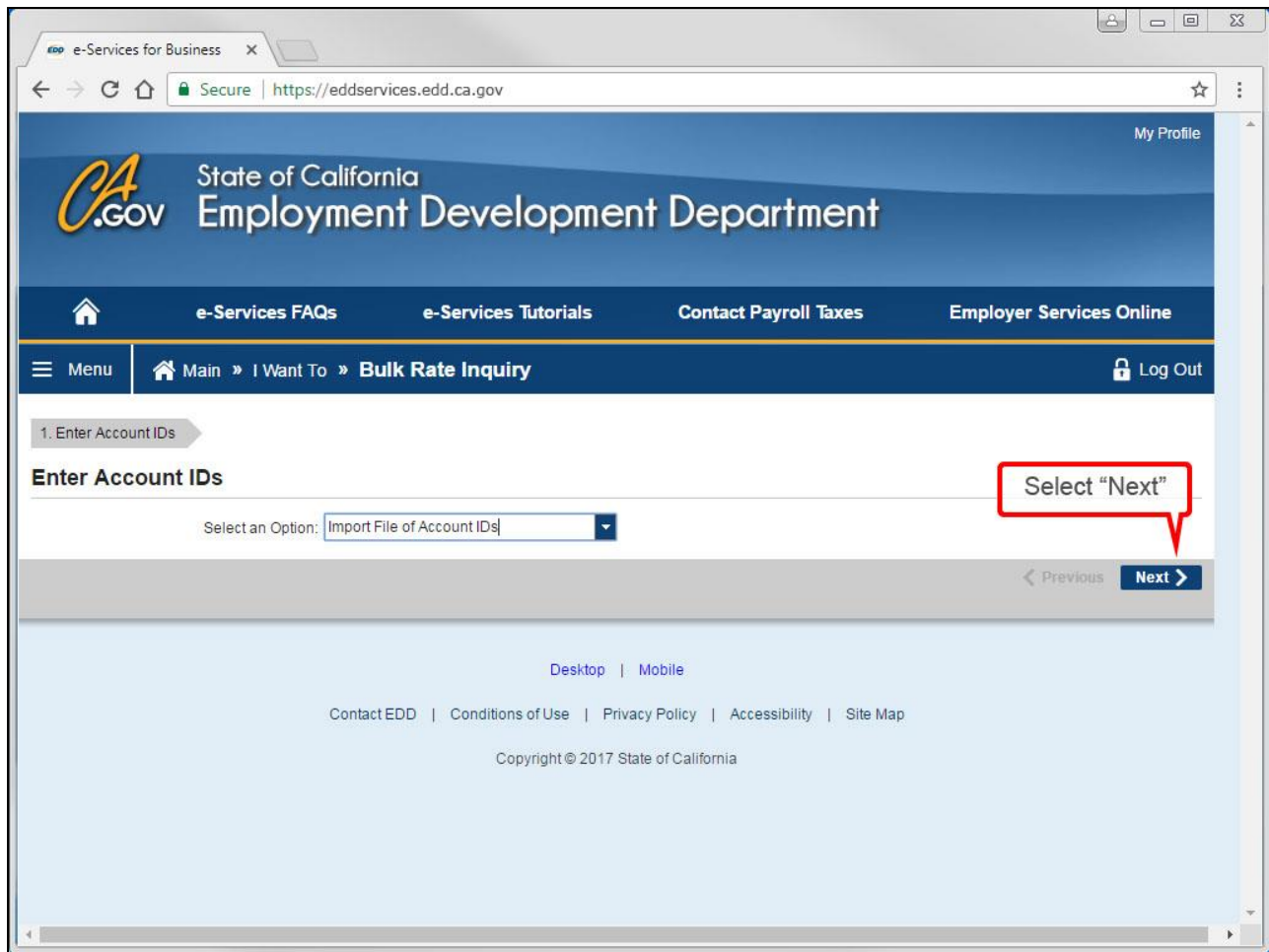
Slide notes

Select "Submit a Bulk Rate Inquiry."



Slide notes

Select "Import file of Account IDs" or "Type in Account IDs." For this example, we select "Import File of Account IDs."



Slide notes

Select "Next" to continue.

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Menu Main » I Want To » Bulk Rate Inquiry Log Out

1. Enter Account IDs 2. Enter Account IDs

Enter Account IDs

Import CSV File:
Select CSV file to be imported from your computer.

CSV File Format
Open a Microsoft Excel, Microsoft Word, or Microsoft Notepad document and enter the data according to the field position layout in the table below:

Field Name	Length	Format	Position (Column)
Employer Account Number	8	Numeric	1

If the file is created in:

- Microsoft Excel, save the file in a CSV type format, .csv (Comma delimited)(*.csv)
- Microsoft Word or Notepad, save the file in plain text format (*.txt), then rename the type to *.csv

Sample CSV File Layouts

12345678
12345679

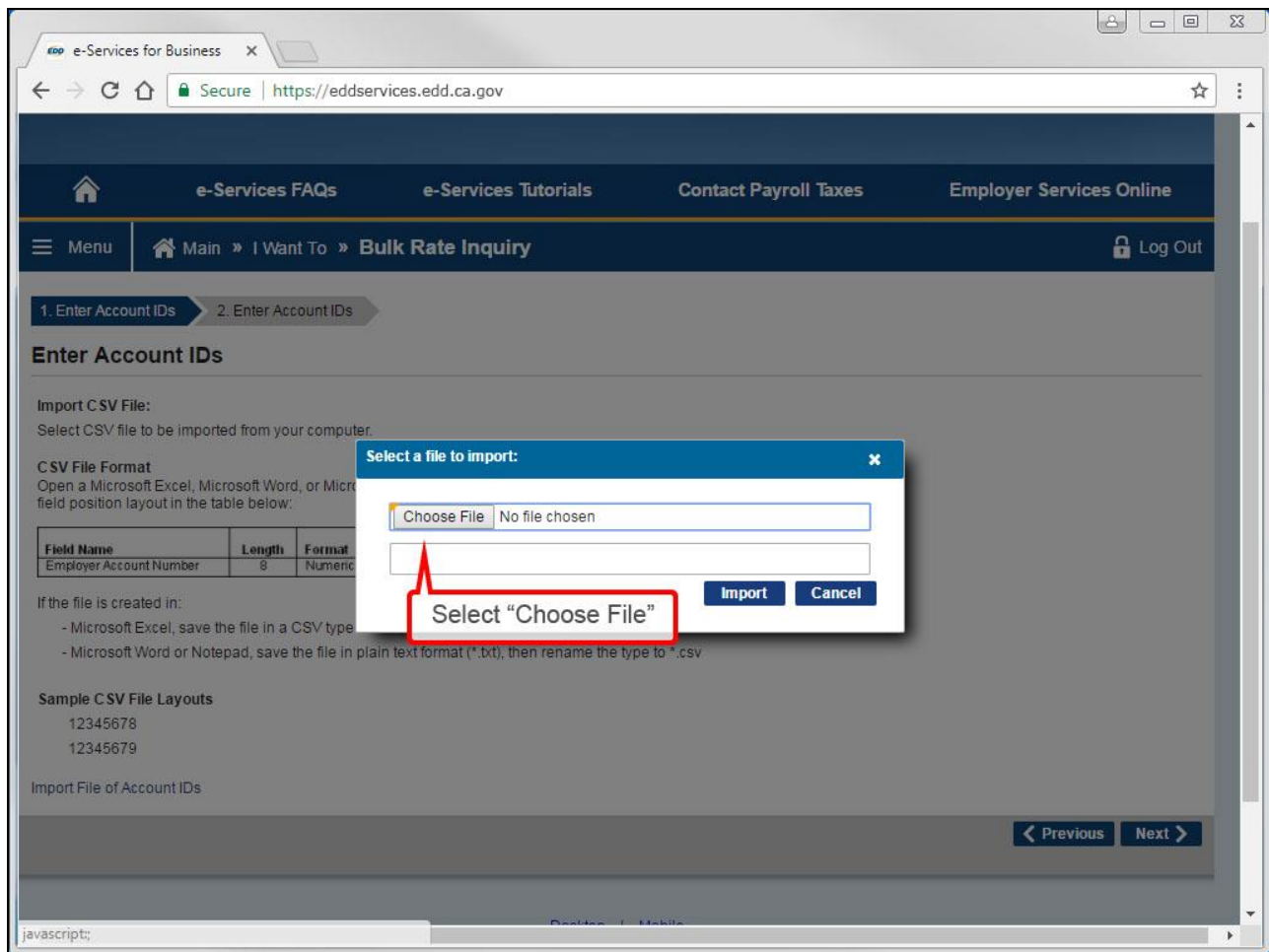
Import File of Account IDs

Previous Next

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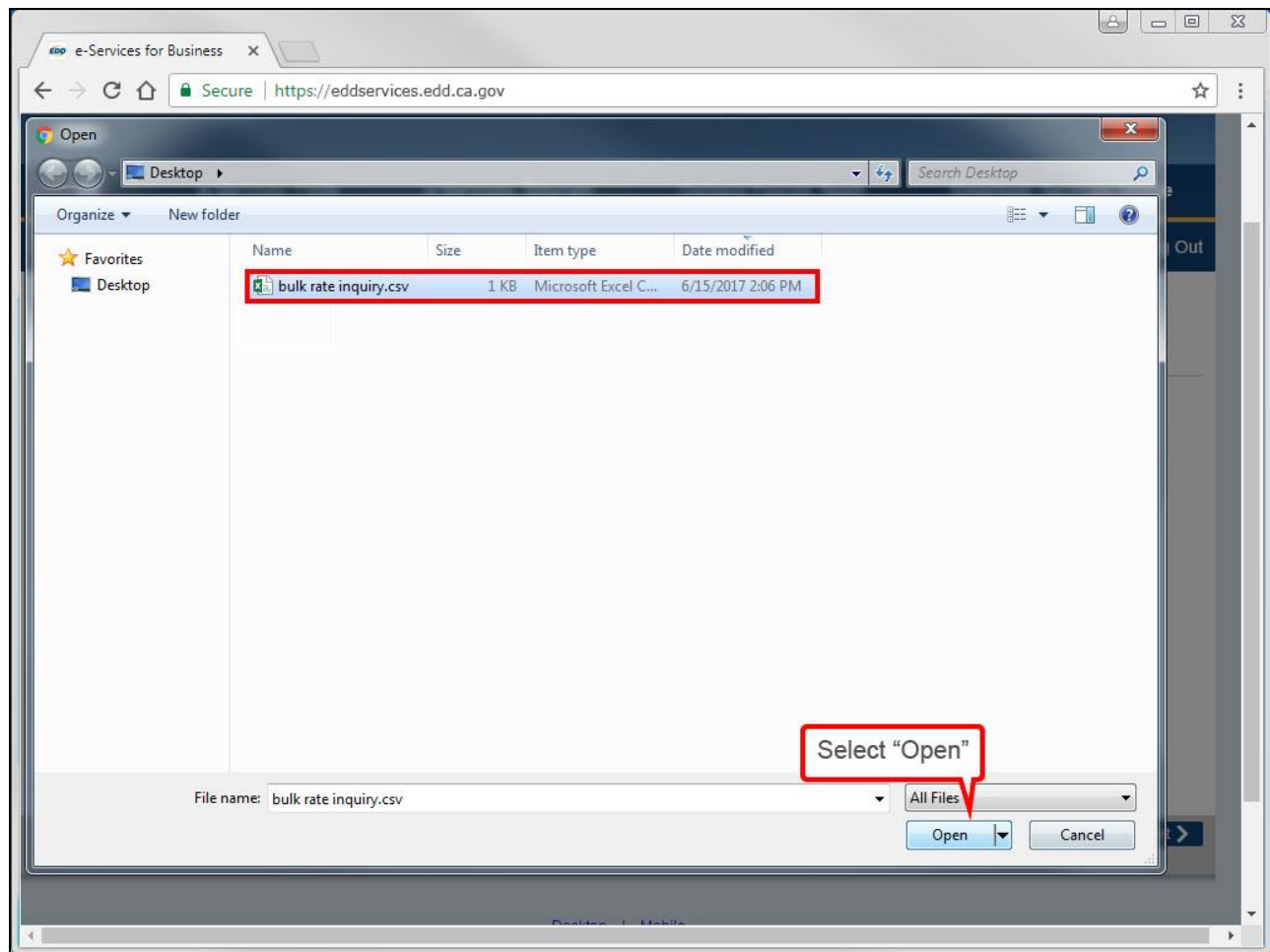
Slide notes

Here are the instructions to import a CSV file from your computer. When you are finished viewing, select "Import File of Account IDs."



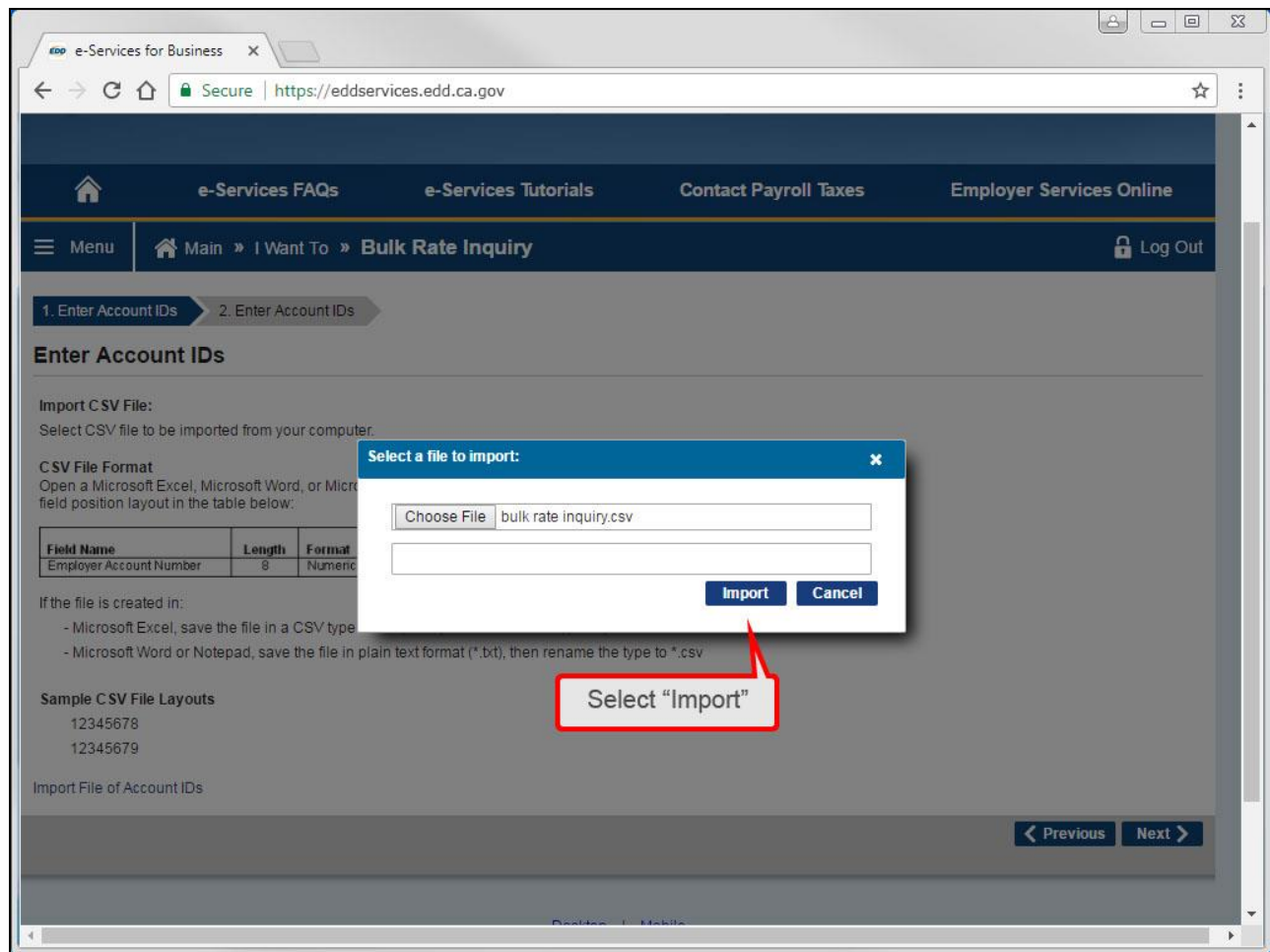
Slide notes

Select "Choose File" to find the file you want to import.



Slide notes

Choose the correct file to import and select "Open" to import the attachment.



Slide notes

Now you can see the file. Select "Import" to complete your inquiry.

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1. Enter Account IDs 2. Enter Account IDs

Enter Account IDs

Import CSV File:
Select CSV file to be imported from your computer.

CSV File Format
Open a Microsoft Excel, Microsoft Word, or Microsoft Notepad document and enter the data according to the field position layout in the table below:

Field Name	Length	Format	Position (Column)
Employer Account Number	8	Numeric	1

If the file is created in:

- Microsoft Excel, save the file in a CSV type format, .csv (Comma delimited)(*.csv)
- Microsoft Word or Notepad, save the file in plain text format (*.txt), then rename the type to *.csv

Sample CSV File Layouts

12345678
12345679

Import File of Account IDs

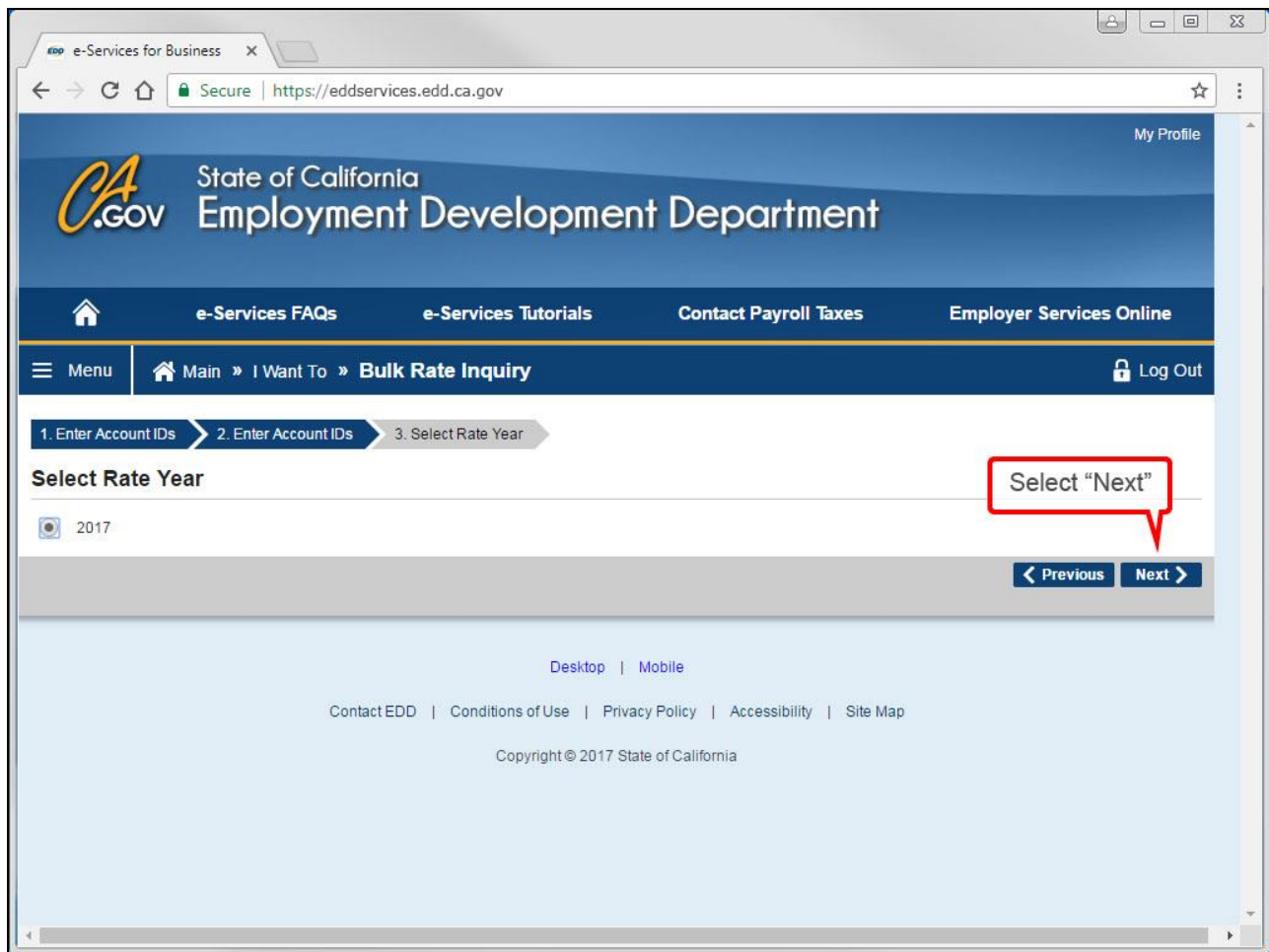
[< Previous](#) [Next >](#)

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Select "Next"

Slide notes

Select "Next" to continue.



Slide notes

For this example "2017" is already selected. If the EDD has Unemployment Insurance information for future years those options will be available to you. Select "Next" to continue.

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Menu **Main** » I Want To » Bulk Rate Inquiry Log Out

1. Enter Account IDs 2. Enter Account IDs 3. Select Rate Year 4. Results

Results

Employer Account Number	UI Rate %	ETT Rate %	Request Status	Year
XXX-XXXX-X	3.40	0.10		2017
XXX-XXXX-X	1.50	0.10		2017
XXX-XXXX-X	6.20	0.00		2017

3 Rows

Filter Export

Previous

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Slide notes

Here is the rate for these three account numbers. When you are done viewing your tax rates, you can select the “Main” link to go back to the e-Services for Business home page. This completes the process for submitting a bulk rate inquiry.



Other Resources
www.edd.ca.gov

Taxpayer Assistance Center
1-888-745-3886

Slide notes

Thank you for taking the time to watch this tutorial on how to upload a bulk payment file, upload a bulk return file, and submit a bulk rate inquiry on e-Services for Business.

Be sure to view our other tutorials demonstrating how to add a payment source, file return, and the many other actions available in e-Services for Business.

Other resources are available at www.edd.ca.gov or by calling the Taxpayer Assistance Center at 1-888-745-3886.